



Sales Season Checklist

Peak sales season approaching soon? Running flash sales and worrying that you might forget something? We've got your back! Here's a checklist to help you do a sanity-check of your setup, help you use numerous Facebook and Smartly.io features, follow best practices, and ensure that you conquer the sales season!

1. Validate Catalogs & Pixel Setup

Recommended timeframe: 7-14 days before go live date.

The most important thing is to **create your finalized image templates several days before your holiday season campaign goes live!** Facebook's processing is under a high load during the holiday season so this ensures all products have the right promotional template available. You can then switch the creatives to use the right template at the right time.

We recommend you don't change the product "Price" field in your catalog to contain your special offer prices as this can require massive catalog updates. It's better to **use for example "Sale Price" to input your special holiday season offers.** [More details here.](#)

Do a website pixel and mobile SDK audit to make sure you're accurately tracking all of your signals and that they are firing on correct website/app pages. Check your Events Manager to see if there are any opportunities to improve the signals you're tracking.

Check Catalog Manager and **ensure your [match rate](#) is as close to 100% as possible** for View Content, Add-to-Cart and Purchase events.

If you are running a sale on a few selected brands, categories, or products [create product sets](#) ahead of time to ensure feed image approval and learnings.

Turn on [automatic advanced matching](#) to increase your match rate, increases your custom audience sizes and for better attribution. You can turn on Advanced Matching by following these steps in Business Manager: Events Manager > Pixels > Choose the pixel from dropdown > Settings > Toggle On Advanced Matching.

2. Ensure Delivery with Proper Campaign Setup

Recommended timeframe: Create campaigns 3-5 days before go live date.

Leverage Automatic placements with all ad sets. Simply select as many placements as possible for all ad sets to allow Facebook to automatically optimize for the best performing placements.

Include multiple ad formats in each ad set. This lets Facebook optimize ads for each user better. Use for example [collections](#), [stories](#), carousels, videos, and link ads with square image.

Go broad with audiences vs. overly-segmenting your targeting to avoid hyper-competitive audiences.

Create combinations of multiple lookalike audiences and lookalikes with higher percentages. In Smartly.io, [you can go up to 20% lookalike.](#)

Only use broad targeting (age, gender, language) for Dynamic Ads for Broad Audiences. Further granularity (such as lookalikes or interests) will only hinder performance.

Bid boldly using Lowest Cost with Bid Cap, and set an aggressive cap. Don't use Lowest Cost without bid cap as it might react too slowly to the change in the auction market to actually win auctions. Be prepared to **increase your bid caps by at least 30% - 40%.**

Use only bid OR budget to control delivery. Make sure the other is high enough to not be the limiting factor.

3. Create All Ads in Advance

Recommended timeframe: Create campaigns & ads 3-5 days before go live date.

(Optional) Before the sales period starts, **consider running separate ads announcing your upcoming sales** to prime potential customers as they might not convert directly on a sale if they aren't familiar with your brand.

Create your sale campaigns 3-5 days before the go live date with a start time on the go live date. Ad approval can take up to 48 hours and this ensures you can deal with any ad disapprovals in time.

Use [Image](#) and [Video Templates](#) that are **tailored to action**. Highlight the promotion (Singles Day, Black Friday, Cyber Monday, Christmas, etc.) and make the discount prominent in your creatives. Remember that we have seasonal Video Template presets that will help you automate the creative process.



4. Monitor and Optimize During Sales Days

Use **lookalike expansion** as soon as your campaign has reached the minimum conversions required (100). [You can even automate this with a trigger](#).

Set up triggers with notifications to monitor if your ad sets are failing to deliver so you can identify problems quickly and fix them. Don't be afraid to increase bids and budgets if they seem to restrict delivery.

If your campaigns last longer than 1 day, use Facebook [Campaign Budget Optimization](#) or [Predictive Budget Allocation](#) with attribution 1 day click-through, 1 day view-through (as in such flash sales the amount of daily conversions should be enough) and **consider adding [budget scaling](#)**. See below for campaigns lasting 1 day or less.

Use [Pivot Tables](#) to monitor your campaigns' results. Here are some useful views you can create:

1. Monitor daily performance focusing on CPA levels and CTR for creatives
2. Account time hourly breakdown to see how much you are spending per hour and make sure that everything is delivering and things are not slowing down. Remember you can change bids and budgets as well as update statuses from pivot tables.
3. Check your spend pacing with a graph with hourly breakdown. You can also use daily breakdown instead of hourly breakdown if your action is not very short in time and you don't require such a detailed analysis.
4. Add Google Analytics metrics (like GA: Sessions or GA: Bounces) to monitor how the web traffic develops.

How to Optimize If Campaigns Last 1 Day or Less?

Create triggers to apply agile changes and ensure delivery. [Here are some examples](#) of triggers adapted to flash sales.

Use [Stop Loss](#), as it takes into account short-term fluctuations in performance.

**Remember that we offer chat support over crucial sales weekends!
Don't hesitate to reach out to us on the chat if you need help.**